



COUNTY OF ERIE

MARK C. POLONCARZ

COUNTY EXECUTIVE

January 27, 2023

Erie County Legislature
92 Franklin Street – 4th Floor
Buffalo, NY 14202

Re: Appointments to Erie County Arts & Cultural Advisory Board

Dear Honorable Members:

Please be advised that, pursuant to Article 22, Section 2205 of the Erie County Charter, I hereby appoint the following individuals to the Erie County Arts & Cultural Advisory Board. Their terms shall expire **December 31, 2025**.

Patricia A. Johnson
111 Lorelee Drive
Tonawanda, NY 14150
New Appointment

Russell Davidson
43 School Street
Orchard Park, NY 14127
New Appointment

Lisa A. LaTrovato
8750 Lapp Road
Clarence Center, NY 14032
New Appointment - Alternate

Should you have any questions regarding these appointments please feel free to contact my office at (716) 858-8500.

Sincerely yours,

Mark C. Poloncarz, Esq.
Erie County Executive

MCP/nnc

cc: Daniel Castle, Commissioner of Environment and Planning
Appointees

Patricia A. Johnson, MBA, CPA, CFE, CGMA
111 Lorelee Drive
Tonawanda, New York 14150
716-390-4433/ patjcpa@gmail.com

November 29, 2022

Mariely Ortiz, Senior Planner
Erie County Arts & Cultural Advisory Board
Edward A. Rath County Office Building
95 Franklin Street
Buffalo, New York 14202

Dear Ms. Ortiz,

I am interested in being considered to serve on the Erie County Arts & Cultural Advisory Board (EACAB). I am a resident of Erie County and a strong believer in the importance of the arts and culture to a community. I have an extensive background in accounting and finance and have consulted with nonprofit organizations to help improve their internal recordkeeping and external financial reporting. I am a Certified Public Accountant (CPA) and a Certified Fraud Examiner. A large portion of my career was spent in higher education, teaching accounting in several local colleges and universities, with over 25 years at Canisius College. While at Canisius, I incorporated service learning into a few of my courses and matched students with local nonprofits for a variety of projects. I am currently teaching online as an adjunct professor and serving as a subject matter expert for the development of online courses. I also have a small accounting practice that provides consulting and tax services for a few small businesses and nonprofit organizations.

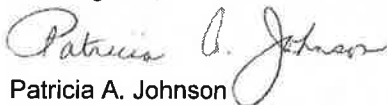
I am winding down other board service in 2023 and would welcome the opportunity to join the EACAB. Having taught nonprofit accounting and worked with nonprofits, I am very comfortable reading financial statements and evaluating budgets. Nonprofit governance is also an area of interest. I had the opportunity to attend the Governing for Nonprofit Excellence Program at Harvard in 2019 through the generous support of the Harvard Business School Club of Buffalo. The program provided an excellent venue for the exchange of ideas and provided a fresh outlook on best practices in board governance.

The arts and culture sector are near and dear to me. My youngest child has pursued a career in the arts and I've become even more aware of the need for and importance of funding to organizations that bring music, art, and theater to communities.

Thank you for considering me to serve on the EACAB. My professional resume is attached. If you would like a copy of my more extensive CV which provides more detail about the academic portion of my career, I would be happy to send it to you.

My contact information is provided above. I look forward to hearing from you.

Best regards,


Patricia A. Johnson

Patricia A. Johnson, MBA, CPA, CFE, CGMA

111 Lorelee Drive
Tonawanda, New York 14150
716-390-4433/ patjcpa@gmail.com

ACCOUNTING PROFESSIONAL
ACCOUNTING SYSTEMS / FORENSIC ACCOUNTING / CONTROLS
SMALL BUSINESS / GOVERNMENT / NON-PROFIT / TRAINING /
FINANCIAL REPORTING

Accounting Professional with a unique blend of business and academic experience. Additional background in servicing small business entities focusing on controls, tax preparation and cash flow. Strong experience and knowledge in compliance and regulations. Excellent facilitation and interpersonal communication skills.

EXPERIENCE / SKILLS

- Knowledge and application of GAAP
- Financial statement preparation and analysis
- Internal control review and implementation
- Tax planning and preparation
- Data analysis and interpretation
- Staff development and training
- Detail-oriented and analytical
- Flexible and adaptable to change
- Adept at communicating financial information to general audiences
- Experienced presenter focusing on nonprofit and fraud awareness/prevention topics

BUSINESS / ACADEMIC BACKGROUND

Business

Patricia A Johnson, CPA, CFE – Consultant

- Advise small businesses and individuals on tax strategies
- Prepare tax returns for small businesses, individuals and nonprofit organizations
- Assist nonprofit organizations in complying with federal and state regulations
- Advise organization on applying for tax exemption status
- Work with nonprofits to identify efficiencies, strengthen reporting and controls, and improve the budgeting process
- Serve as outsourced finance director/CFO
- Assist with preparation of workpapers for financial statement audit
- Consult on succession planning strategies for closely held business
- Evaluate and recommend software and accounting systems for small businesses
- Test and evaluate internal controls

Dopkins and Company - Audit Supervisor

- Conducted audit engagements primarily in the not-for-profit industry
- Responsible for audit planning and staff supervision

Toric Optical – Controller

- Coordinated accounting function for five locations and distributor
- Served as primary contact for external auditors
- Supervised and trained central office staff

Mumbach, Morgan and Company – Senior Accountant

- Performed tax, accounting and audit services
- Industries included nursing homes, a hospital, wholesalers and manufacturers

Touche, Ross & Company (Deloitte) – Senior Accountant

- Performed audits of clients in the healthcare, construction, government and not-for-profit industries along with manufacturing and service businesses
- Coordinated the audit of a large city school district

Academic

Southern New Hampshire University – Adjunct Instructor, Online

Mercy College – Adjunct Instructor, Online

Canisius College - Assistant Professor, Accounting; Coordinator of MS in Forensic Accounting

- Developed Master's program in forensic accounting along with courses in fraud examination and financial fraud
- Taught upper level and graduate courses including
 - Advanced accounting – consolidations, foreign currency
 - Intermediate accounting
 - Nonprofit and governmental
 - Accounting theory
- Actively assisted with student placement
- Engaged with members of Council on Accountancy to expand opportunities for students and faculty development
- Connected students with opportunities for scholarships, conference experiences, and professional networking
- Engaged students in service-learning projects for local nonprofit organizations

SUNY Empire State College

- Mentored nontraditional students
- Facilitated accounting courses included in degree plans
- Developed and taught courses in residency format for business professionals

Other Academic Experience

- The State University of New York at Fredonia – Lecturer
- Niagara University – Visiting assistant professor
- Daemen College – Instructor; Visiting Assistant Professor
- D'Youville College – Instructor

EDUCATION

Master of Business Administration, SUNY at Buffalo
Bachelors of Business Administration - Accounting, St. Bonaventure University

PROFESSIONAL LICENSE AND CERTIFICATIONS

Certified Public Accountant, New York State
Certified Fraud Examiner
Chartered Global Management Accountant

ADDITIONAL SKILLS

- Proficient in Microsoft Office, QuickBooks
- Familiar with CaseWare IDEA and Tableau
- Excellent written and oral communication skills
- Ability to present complex information in easy-to-understand format

PROFESSIONAL AFFILIATIONS

- New York State Society of Certified Public Accountants
- American Institute of Certified Public Accountants
- Accounting and Financial Women's Alliance
- American Accounting Association
- Institute of Internal Auditors
- Association of Certified Fraud Examiners
- Association of Government Accountants
- Institute of Management Accountants

HONORS AND AWARDS

- 2013 Outstanding Accountant in Western New York – Canisius Council on Accountancy
- Donald E. Calvert Outstanding Professor Award
- Mark Chain/FSA Teaching Innovation Award
- Deloitte Alumni Award – Volunteerism
- Service-Learning Award – Wehle School of Business Advisory Council

VOLUNTEER AFFILIATIONS

- Chair of Finance Committee, New York Council of Nonprofits (NYCON)
- Treasurer, The Arc Erie County New York
- President, NYSSCPA's Foundation for Accounting Education (FAE)
- Chair, Audit Advisory Committee, Buffalo Board of Education
- Board Member, New York State Society of CPAs, Buffalo Chapter
- President, WNY Chapter, Association of Certified Fraud Examiners
- Western New York Advisory Council Member, Boardstrong

Russell Davidson

43 School Street
703-973-8074

Orchard Park, NY 14127
Russellid149@gmail.com

November 22, 2022

Ms. Mariely Ortiz
Senior Planner
Erie County

Dear Ms. Ortiz,

Please accept this letter and accompanying résumé as my application for membership on the Erie County Arts & Cultural Advisory Board (EACAB). As a resident of Erie County and avid art collector and supporter of the arts, I would greatly enjoy the opportunity to assist with EACAB's significant impact on the development of the arts and cultural community throughout our region. Having served in key roles in banking, arts, and academia, I am certain my unique mix of experiences make me an exceptional candidate for this Board.

Working in the banking industry, I create forecasts and analyses of business plans, cash flows, expenses, efficiencies, controls, and risks for the Senior Management Team. I collaborate with Senior Management of various business lines to develop contingency plans for personnel and processes to ensure continuity of business. I also ensure potential risks are properly identified and plans are in place to mitigate losses.

Having served as a Program Director at D'Youville College, I developed strategies to implement the institution's vision to breakdown traditional barriers to higher education and to healthcare. Amid a pandemic, I created workforce development courses designed to address the needs of the healthcare industry and those of our community while also addressing economic fractures. I also utilized data and input from faculty and a diversity of industry and community partners to develop programs to address access, social, economic, and academic disparities at all levels of education.

As the Innovation Lab and Special Projects Manager at the Albright-Knox Art Gallery, I created and managed inter-disciplinary collaborative projects, bringing together academic institutions, hospitals, private businesses, government agencies, trade unions, and inner-city community organizations, which aimed to redefine the museum of the 21st Century. The Innovation Lab was a unique department, aspiring to fulfill the museum's vision to serve as a hub of artistic and creative energies that enriches and transforms people's lives. My collaborative project teams researched, investigated, and piloted ways the arts could address some of the most pressing needs in our society, from healthcare to social justice.

I served in the leadership in these roles at the College and the Museum, drafting and implementing strategic plans while also developing specific business plans, including fundraising and sustainability, for each of my projects. In many cases, these projects were more like start-ups requiring me to build a team and diverse programs from the ground up. I also developed strong networks with artists and cultural leaders in our community, nationally, and globally.

I am confident my unique mix of skills and experience in academia, the arts, and banking will serve as a strong asset for EACAB, the County, and our community. I look forward to hearing from you regarding my candidacy. Please feel free to contact me at 703-973-8074 or through the email listed above. Thank you for your time and consideration.

Best regards,

Russell Davidson

Russell Davidson

43 School Street, Orchard Park, NY 14127
703-973-8074
Russelld149@gmail.com

EMPLOYMENT HISTORY

Vice President, Continuity of Business and Crisis Management Lead Analyst, Citigroup, Buffalo, NY
September 2022 – Present

- Collaborate with Senior Management of Business Lines to develop contingency plans for personnel and processes to ensure continuity of business
- Work with global team to provide 24-hour coverage, analysis, and testing for risk scenarios
- Ensure potential risks are properly identified and plans are in place to mitigate losses
- Coordinator with technology and Artificial Intelligence teams to adapt to emerging technologies

Title III Program Director, D'Youville, Buffalo, NY; July 2020 – September 2022

- Managed US Department of Education funded program, utilizing data to identify, develop, and implement improvements toward increasing retention, persistence, and graduation rates with particular focus on under-represented minorities
- Directed team in the development and implementation of critical life skills curriculum and tutoring program for at-risk high school students
- Organized inter-disciplinary project committees to ensure student engagement and develop and promote professional development opportunities for faculty
- Worked closely with Deans of the four schools, Department Chairs, and Faculty Senate to identify opportunities for innovative education and engagement enhancements
- Originated workforce development programs in collaboration with schools at the university, targeted to trainees who are out of the workforce, unemployed, or under-employed
- Identified strategic, crucial partners in the community to assist with program development, training, recruitment, and long-term execution
- Developed five-year strategic plan for the grant program, with corresponding budget

Partnership Specialist, US Census Bureau, Buffalo, NY; Aug 2019-July 2020

- Identified key partners among local governments, businesses, and community groups and cultivated relationships to develop specific strategies to bolster response rates for the Decennial Census, focusing on underserved communities
- Developed presentations, gave briefings, conducted meetings, and promoted partnerships with various governments, local businesses, and community groups

Innovation Lab & Special Projects Manager, Albright-Knox Art Gallery, Buffalo, NY; Oct 2014-Oct 2019

- Served on Senior Management Team, directing the operations, programming, marketing, and \$10 million annual budget, while overseeing \$185 million capital campaign and campus expansion
- Co-Deputy Chair of the Strategic Planning Board Committee, which developed a ten-year plan for a more engaged and inclusive institution
- Developed an Art in Social Enterprise program bringing together artists, artisans, tradespeople, and craftsmen for a workforce development program training people currently on Social Services, resulting in most successful graduation, placement, and retention record in the region, while making art more relevant to entire segment of our community
- Conceptualized and developed clinical trials in collaboration with Roswell Park Comprehensive Cancer Center to investigate the role of art in the healing process, resulting in the first trials for find positive, statistically significant impacts on patients' mental health
- Developed and managed collaborative project to investigate the effect of an arts education while investigating the impact of regulations, curriculum changes, and budget cuts on visual arts education
- Served on NYSCA Advisory Panel, reviewing and providing recommendations on funding decisions for New York State grant applications

Credit Risk and Business & Planning Analyst, M&T Bank, Buffalo, NY;
Aug 2012-Oct 2014

- Assisted Corporate Counsel and Government Relations Office with drafting guidelines and response papers to proposed or enacted banking regulations
- Created forecasts and analyses of business plans, income, cash flows, expenses, controls, and risks for Senior Management and Board of Directors
- Audited and developed analyses regarding business efficiencies, record keeping, compensation, and performance
- Compiled performance reports and presentations for Senior Management and Board of Directors
- Drafted five scenarios for Senior Management of new compensation and incentive programs within set parameters to promote more efficient record keeping while bolstering incentives

Audit Risk Modeling Senior, Making Home Affordable-Compliance, McLean, VA; Aug 2010-Aug 2012

- Served as lead analyst on audit team, overseeing team of consultants
- Recommended changes and clarifications regarding US Treasury Department's financial policies
- Presented policy reviews and summaries to entire Making Home Affordable-Compliance Division
- Identified potential risks and necessary testing for key provisions in new and updated US Treasury policies

Senior Quantitative Analyst, AVP, HSBC Mortgage Corp., Depew, NY; Feb 2007-Aug 2010

- Developed statistical and analytical processes in consultation with mortgage executives to support financial product strategy and development
- Recommended changes for loss mitigation strategies, resulting in 50% decline in re-default rates
- Provided analytical support to senior management to track and evaluate employee performance
- Analyzed performance and offered recommendations on mortgage portfolio of over \$50 billion

Bankruptcy Analyst, Chase Home Finance, Columbus, OH; Mar 2005-Dec 2006

Graduate Assistant, Political Science, The Ohio State University, Columbus, OH; Sept 2001-Mar 2005

Government Affairs Liaison, The Erie County Sheriff's Office, Buffalo, NY; Aug 1999-Sept 2001

Assistant Campaign Manager, Jack Quinn for Congress, Buffalo, NY; Nov 1993-Feb 1997

Staff Assistant, Office of Congressman Jack Quinn, Buffalo, NY; Feb 1993-June 1996

EDUCATION

Master of Arts, Political Science, 2005

The Ohio State University, Columbus, OH

- Thesis: Is the European Union Contributing to a Rise in Extremist Political Parties?
- Thesis Advisor: Professor Timothy Frye, The Ohio State University (currently Department Chair, Columbia University)

Bachelor of Arts, Political Science, 2001

University at Buffalo, State University at New York, Amherst, NY

- Honors Thesis: Can "Kids Voting, USA" Diminish Inequalities in Voter Participation?
- Thesis Advisor: Professor D. Munroe Eagles, University at Buffalo, SUNY

LISA A. LATROVATO

8750 Lapp Rd, Clarence Center, NY 14032

Tcblisa@gmail.com | (716) 864-7095

<https://lisalatrovato.com/>

PROFILE

Proactive, goal-oriented, and motivated MBA offering diverse experience in strategic fundraising, relationship-building, and event management to support organizational mission. Dedicated professional with a proven track record for leading initiatives from brainstorming stages to tactical execution.

PROFESSIONAL STRENGTHS

- Major gifts
- Cultivation
- Social networking
- Stewardship
- Prospect identification
- Annual appeal
- Event management
- Donor relationships
- Team building
- Non-profit campaigns
- Moves management
- Program administration
- Grant writing
- Microsoft Word
- Microsoft PowerPoint
- Microsoft Excel
- Public speaking
- Persuasive presentation
- Time management
- Customer service

EXPERIENCE

Hauptman-Woodward Medical Research Institute

Donor Relations Manager

September 2019-present

- Develop strategy for long range fundraising plan
- Annual Giving
- Planned Giving
- Support PR and media efforts
- Grant and Foundation Submissions
- Gift Records Management
- Sponsor and Corporate Relations Management
- Government communications

Children's Hospital Foundation of Buffalo

Sr. Development Associate

November 2004 – July 2019

- Plan and develop events for Oishei Children's Hospital
- Integral part of the \$52 million capital campaign to build the new hospital
- Promote and raise funds to support Oishei Children's Hospital
- Responsible for cultivating and securing outright gifts from individuals and foundations
- Prospect and obtain major gifts- total of over \$50 million over the years
- Coordinate media to increase community awareness through media buys
- Significantly expanded and updated database of donors and prospects
- Established positive identity for a sponsor organization

- Responsible for maintaining proper records of donations, donor's contact detail and contact history
- Handle the tasks of communicating effectively with donors
- Responsible for giving compelling presentations about charity during public debates, conferences and events
- Responsible for developing and maintaining good relationship with patrons and supporters
- Plan and maintain volunteer support strategies for marketing, press, events and fundraising
- Maintain the social networking sites for the hospital
- Research and prepared grants receiving over 2 million over the year
- Cultivate donors; manage and maintain donor stewardship
- Major accounts included: Tops, Rite Aid, Tony Walker, Kiss Cares for Kids Radiothon, Dance Marathon, Extra Life, Credit Unions, Speedway and numerous annual events

D'Youville College

August 2015 – August 2017

Adjunct Professor

- Created curriculum and organized out of classroom experiences
- Managed online assignments and grading
- Created online materials and exams

Congresswoman Louise Slaughter

January 2000 – October 2004

Congressional Aide

- Initiated Northland Commerce Park Project, which has the potential job creation of 5000 jobs. (Investment was \$1.5 million of federal money)
- Represented the Congresswoman at various events in the Congressional District
- Wrote numerous pieces of correspondence on her behalf
- Managed case work on various issues
- Prepared speeches and talking points for the Congresswoman
- Planned numerous events for various themes

EDUCATION

Canisius College

MBA - International Business and Finance

University at Buffalo

BS in Business Administration – Marketing and Human Resources

Monroe Community College

AS in Business Administration

Student Trustee

President of Accounting and Business Club

COMMUNITY LEADERSHIP

This Little Light of Mine Giving Circle- Focus on Youth

2023

- *Established giving circle of middle school to high school students who learn how to run their own giving circle. They learn leadership skills and are mentored by young professionals. They have a chance to learn and earn community service hours. They choose the local charities to support in Western, NY.*

WNY Women's Foundation

2022

Committee Member- Fall in Fashion

- Committee Member to help plan and execute the Fall in Fashion event that raises funds to support women and girls in WNY.

Jennie's Giving Circle- Focus on Mental Health

2022

Founder and President

- *Established giving circle with generations of professional women that support organizations helping mental health in Western, NY*

Fifty Fabulous Women Giving Circle- Charlotte, NC

2022

Founder and President

- *Established giving circle with generations of professional women that support organizations helping women and children in Charlotte, NC.*

Friends of Buffalo Creek International

2022

- Helped Establish virtual charter school in Poland for Ukraine Refugee Children

Canisius Alumni Board of Directors

2022

Director

- Create lifelong bonds with alumni through meaningful engagement opportunities

Graycliff Conservancy

2021- Present

Board member

Governance Committee Chair

Women United- United Way of Buffalo and Erie County, Buffalo, NY

2021-Present

Women's History Luncheon Co-Chair

- Help launch a new event in March 2022 for UWBECC to celebrate women's history month and raise funds for critical programs.

50 Fabulous Women Giving Circle, Buffalo, NY

2019 - Present

Founder and President

- *Established giving circle with generations of professional women that support organizations helping women and children in the eight counties of Western New York*

Canisius College, Buffalo, NY

2014 – 2021

MBA Alumni Board Member/Past President

President 2018-2019

- *Developed a multi-year strategic plan for the organization to stay sustainable*

University at Buffalo, Buffalo, NY

2016 - Present

School of Management Alumni Association Board Member (SOMAA)

Past Chair Events Committee

- *Lead numerous events to benefit the School of Management*

Memberships

21st Century Fund

Buffalo Yacht Club

Buffalo Harbor Sailing Club

Niagara Sailing Club- Rear Commodore

Member of St. Michael's Church

Harvard Business School of Business Nonprofit Management Program

Awards/ Honors

2022 Gates Chili High School Alumni Hall of Fame Inductee

2021 Buffalo Business First Woman of Influence

2021 Monroe Community College Hall of Fame Nominee

2020 Athena Award Finalist

2022 Athena Award Finalist